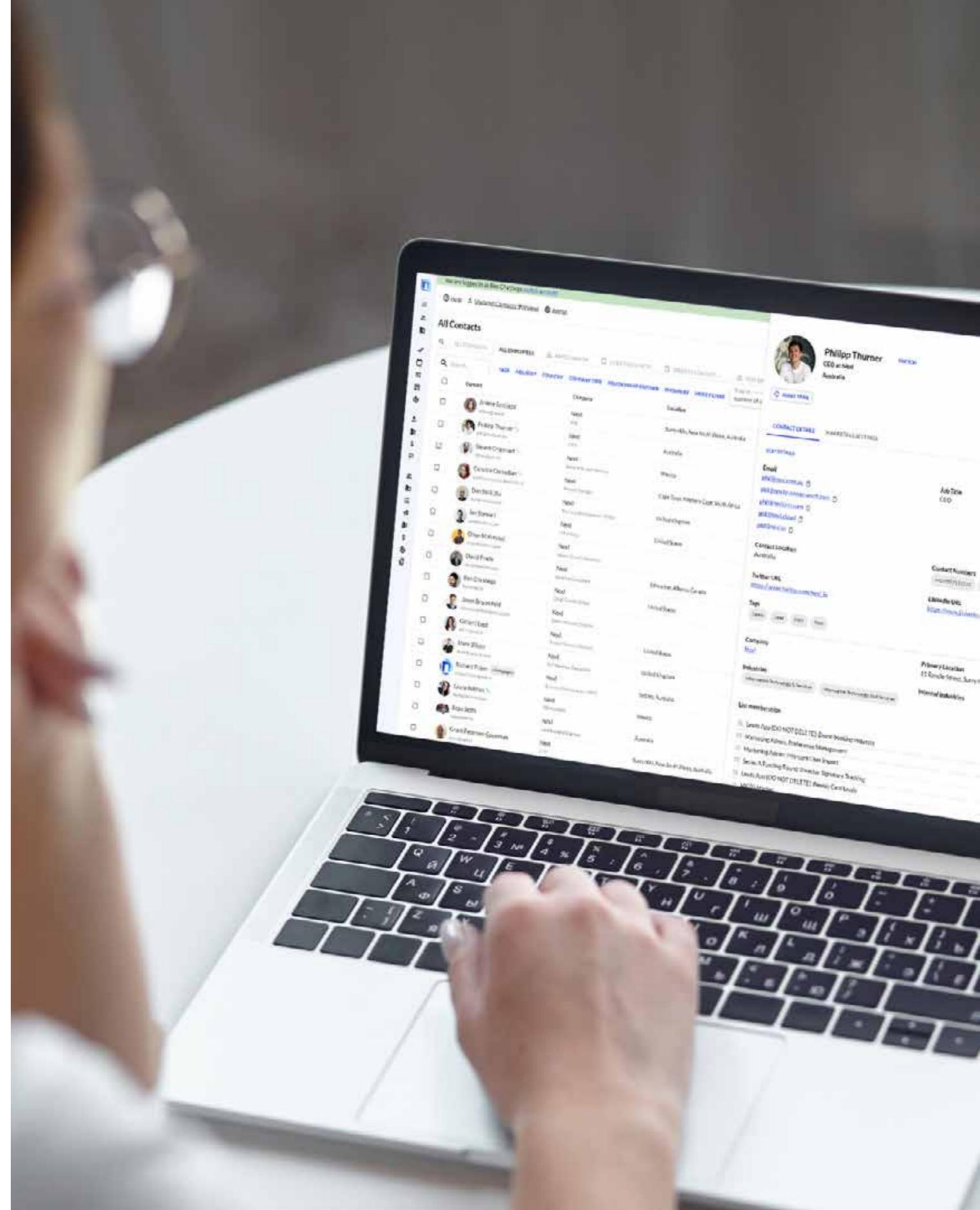




WHITEPAPER

Proving ROI with CRM-Integrated Event Management

This white paper explores the evolution of event management in law firms, highlighting shifts from in-person to virtual events based on insights from nine global law firm clients. It addresses current challenges and demonstrates how CRM and event management platforms can enhance ROI and what Nexl calls ROE (Return on Events), offering a roadmap for future strategies with an emphasis on personalized, high-impact events.



Contents

Introduction: Surveying Global Law Firms

Events have long been a cornerstone of marketing and business development for law firms. They serve as a platform for networking, showcasing expertise, and building relationships with current and potential clients. However, with the significant disruption of traditional event formats through the COVID-19 pandemic, law firms quickly adapted to new modes of engagement –and have continued to innovate in the years since.

This white paper explores the evolution of event management in law firms, examining past practices, current trends, and future directions, with a focus on how technology like CRM systems have facilitated these changes while enhancing law firm growth potential.

Nexl surveyed and interviewed global law firm clients to uncover insights on how leading firms are leveraging CRM-integrated event management to drive business growth.



Past State: Insights on Pre-Pandemic Events

Before the pandemic, in-person events were the norm for law firms. These included large mass marketing events that catered to broad audiences, frequent networking events, and regular conferences, workshops, and client dinners. These events were crucial for face-to-face interactions and building personal connections. However, the operational and planning logistics—especially for large-scale events—were taxing, and gaps existed when it came time to calculate ROI (Return on Investment) from events.

These pre-pandemic events included a variety of formats, such as large-scale conferences, specialized workshops, client entertainment, and frequent networking gatherings. Each type of event served a distinct purpose in the law firm's marketing mix. Conferences and workshops often positioned the firm as a thought leader in specific legal domains, while client dinners and networking events provided opportunities to nurture existing relationships and forge new connections. These events were meticulously planned and executed, requiring significant time and resources to ensure their success.

The importance of these in-person interactions cannot be overstated. For law firms, face-to-face meetings were essential for building trust and establishing personal connections with clients and prospects. These events allowed lawyers to showcase their expertise and build rapport, which are critical elements in securing and retaining clients. The personal touch facilitated by in-person meetings often led to stronger, long-term relationships that were less likely to be influenced by competitors. Moreover, these events provided a platform for firms to demonstrate their commitment to their clients and their industry, thereby enhancing their reputation and visibility.

However, organizing these events posed significant challenges for legal marketers. The logistics of planning large-scale events were complex and resource-intensive, often involving coordination with multiple stakeholders, securing venues, managing registrations, and ensuring effective follow-up. Measuring the ROI, or what Nexl calls ROE (Return on Events) from these events was another major hurdle. Despite the clear benefits of face-to-face interactions, attributing specific client acquisitions or revenue gains directly to these events was difficult. This lack of precise ROE measurement often made it challenging to justify the considerable expenditure of time and resources, highlighting the need for more sophisticated tracking and analytics tools in event management.



Current State: Law Firms' Perspectives on Today's Events

The current landscape of event management in law firms reflects significant adaptations and challenges in both in-person and virtual formats. The COVID-19 pandemic necessitated a rapid shift to virtual events, including webinars, virtual workshops, and online conferences, as firms sought to maintain engagement and business development amidst social distancing measures. This shift, driven by safety and convenience, required law firms to innovate and create inclusive, interactive virtual spaces for relationship-building initiatives. The increase in virtual events underscored the importance of robust Event Management platforms and CRM systems, which are crucial for managing contact lists, event registrations, participation tracking, and follow-ups, ensuring seamless and effective virtual event execution.



Embracing Virtual
Events



Evolution of
In-Person Events

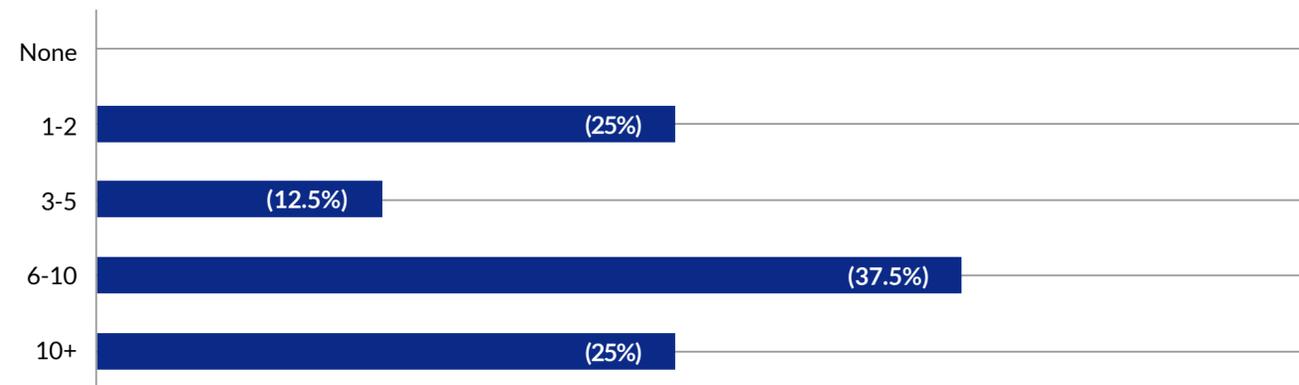


Challenges with
Events & ROI

Embracing Virtual Events

The pandemic forced a rapid shift to virtual events, including webinars, virtual workshops, and online conferences. Attendee preferences also shifted towards virtual participation due to safety concerns and convenience, and firms were challenged to foster engaging virtual spaces to engage clients creatively. As a result, those who adopted virtual events are now paving the way to create more inclusive, interactive, and innovative engagements for internal and external relationship-building initiatives.

On average, how many virtual legal events (including webinars, workshops, etc.) do you plan for your firm annually?



Data and insights prepared are based on a recent survey conducted by Nexl with nine, carefully selected, global firms.

With the increase in virtual events being hosted, Event Management platforms and CRM systems became even more vital in managing contact lists, event registrations, participation, and follow-ups.



In 2024 - 2025 we expect to see continued innovation in event formats and a focus on creating inclusive, sustainable, and engaging experiences.

Chantal Williams | Von Wobeser y Sierra

VON WOBESER



Pro Tips: How to Execute Pre- & Post-Event Needs

PRE-EVENT NEEDS

Online Registration and Marketing:

[Cvent](#), [Eventbrite](#), [Bizzabo](#), [Nexl](#): These platforms excel in providing customizable online registration forms and effective event marketing tools, ensuring a smooth pre-event experience.

Attendee Management:

[Cvent](#), [Eventbrite](#), [Bizzabo](#), [Nexl](#): Streamlining attendee management, these platforms offer features for efficient tracking and communication with registrants before the event.

Networking and Engagement:

[Whova](#), [Bizzabo](#): Enhancing pre-event networking by connecting attendees based on interests and facilitating meaningful interactions.

Virtual Event Planning:

[Zoom](#), [Microsoft Teams](#): Essential for law firms planning virtual events, offering high-quality video conferencing, screen-sharing, and interactive chat functionalities.

POST-EVENT NEEDS

Analytics and Reporting:

[Cvent](#), [Eventbrite](#), [Bizzabo](#), [Nexl](#): These platforms offer robust post-event analytics, providing insights into attendance, engagement, and other key metrics.

Feedback and Evaluation:

[Whova](#), [Aventri](#), [Nexl](#): Collecting post-event feedback and providing tools for thorough evaluation of event success.

Post-Event Networking:

[Whova](#): Facilitating continued networking post-event, allowing attendees to stay connected while fostering a sense of community.



More tips provided in Nexl's blog on [Event Management Tech Tools for Law Firm Events](#).

Evolution of In-Person Events

Events have made a comeback to pre-pandemic levels, but getting people to show up and show out has been challenging. Competing demands and the rise of virtual events have made highly tailored events, personalized to the right audience with clear value propositions, essential for RSVPs and turnout. People are excited to see others face-to-face, and the in-person interactions are priceless.



Events in our market seem to be back to pre-pandemic levels. We do see that no-show rates seem to be a bit higher than they were previously. Overall people seem to appreciate the opportunity to be in person and appreciate the offerings we provide.

Tanya Riggan | Koley Jessen

KOLEY ■ JESSEN

In-person events have become smaller and more targeted. Law firms need to clearly articulate the value proposition of attending these events to ensure good turnout, especially when travel is required. Personalization and tailoring to specific client needs has become essential.



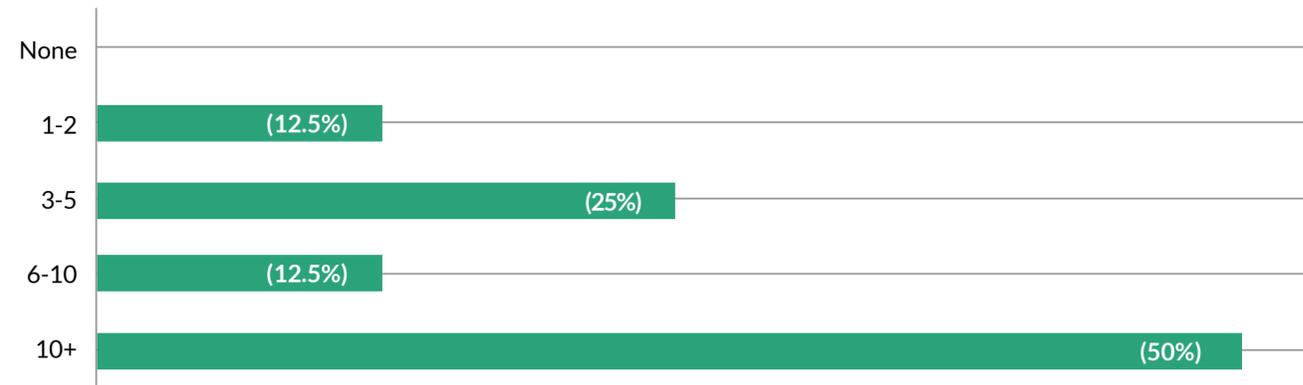
People are only in the office a few days a week, and more unwilling to spend time out of hours at external events, so events need to have a strong value proposition and reason for attendance.

Brenton Anderson | Dentons

DENTONS



On average, how many in-person legal conferences (including dinners, workshops, etc.) do you plan for your firm annually?



Data and insights prepared are based on a recent survey conducted by Nexl at nine, carefully selected, global firms.

Key Findings:

- Current successful event formats in law firms have evolved to prioritize engaging and meaningful interactions.
- Speaking opportunities such as panels and fireside chats are particularly effective, as they engage audiences with thought leadership content and foster dynamic discussions.
- Additionally, casual networking opportunities are highly valued for their ability to facilitate client development and strengthen professional relationships.
- When asked “What are the top 3 factors that drive event success?”, the majority of respondents deemed audience composition, speakers/panelists, and networking opportunities as their highest drivers of event success.



Attendees seemed thrilled to be able to meet and greet in-person post-COVID. I believe you'll continue to see events designed for specific audiences with the focus on the quality of attendees and not the quantity.

John Eix | Crowe & Dunlevy



Pro Tips: How to Engage Speakers and Encourage Meaningful Networking

1. Engaging and Prepping Speakers:

Clearly communicate the event's objectives to your speakers, ensuring they understand the goals and audience expectations. Provide them with detailed briefs and sample questions to help them prepare relevant and impactful content. Offer rehearsal sessions to familiarize speakers with the event format, technology, and logistics. Encourage them to engage the audience by sharing personal anecdotes, asking questions, and incorporating interactive elements into their presentations.

2. Organizing Networking Opportunities:

Schedule dedicated networking sessions before and after panel discussions to facilitate connections. Create a comfortable environment with designated areas for casual interactions, such as coffee breaks or lounge spaces. Integrate structured networking activities like "speed networking" or themed discussion tables to help attendees make meaningful connections quickly.

3. Enhancing Audience Engagement:

Encourage speakers to use interactive tools like live polls, Q&A sessions, and real-time feedback platforms to keep the audience engaged and participatory. Design the event format to include breakout sessions and roundtable discussions that allow for deeper dives into specific topics and more personalized interactions between attendees and speakers.

4. Innovative Networking Ideas:

Consider unique icebreaker activities, such as a "networking bingo sheet." This encourages participants to talk to various people and get to know them. At the end of the event, attendees can submit their completed bingo sheets for a chance to win a prize. This method not only stimulates interaction but also adds an element of fun. Example resource: [Networking Bingo](#)

5. Pre- and Post-Event Strategies:

Facilitate introductions and set the stage for networking by sharing attendee lists and speaker profiles before the event. This helps participants identify and connect with individuals of interest. Post-event, encourage follow-up interactions by providing digital business cards and facilitating connections through social media groups or dedicated event apps.



More on how to maximize your presence during law firm events in this [Comprehensive Guide to Live Engagement](#).

Pro Tips: How to Maximize Turnout with Advanced List Segmentation & Personalization

Analyze Past Event Data

Review attendance and engagement metrics from previous events to identify which segments of your audience were most engaged and tailor your invite lists accordingly.

Use CRM Data for Segmentation

Leverage your CRM system to segment your audience based on factors such as industry, job role, and previous interactions with your firm to ensure invites are relevant.

Customize Invitations

Personalize invitations with specific content and calls-to-action that resonate with the targeted segment, increasing the likelihood of attendance.

Align with Event Goals

Ensure the invite list aligns with the event's objectives, whether it's networking, knowledge sharing, or business development, by inviting those who will benefit most and contribute to the event's goals.

Leverage Insights from Key Stakeholders

Gather input from partners and other key stakeholders who interact directly with clients to identify and invite the right people who would find the event valuable.



More list building and audience segmentation details with Nexl's [Event Management platform](#).

Challenges with Events & ROI

Simultaneously, the return of in-person events has presented its own set of challenges. While face-to-face interactions are highly valued, firms must now craft highly tailored events with clear value propositions to ensure good turnout. The rise of virtual events has raised the bar for in-person gatherings, necessitating a more personalized approach to meet specific client needs. Successful event formats in law firms now prioritize engaging and meaningful interactions, with speaking opportunities such as panels and fireside chats, and casual networking opportunities highly valued for facilitating client development and strengthening professional relationships. Overall, the current state of event management in law firms is marked by a blend of adapting to virtual environments and refining in-person experiences, leveraging technology and strategic planning to overcome challenges and maximize the impact of events.



Speaking opportunities, especially panels and fireside chats, engage audiences effectively. Casual networking opportunities are also essential for client development.

Brenton Anderson | Dentons



Research and goal setting, engaging formats, and expert speakers tailored to the audience are key. Tailoring invite lists based on audience analysis and segmentation makes events more impactful.

Chantal Williams | Von Wobeser y Sierra

VON WOBESER



Challenges with In-Person Events

Despite a return to in-person events, challenges still remain:

- Difficulty in timing, location selection, and scheduling
- High logistical demands (e.g., venue, catering, AV equipment)

Despite the return to in-person events, law firms continue to face significant challenges in executing these gatherings effectively. One of the primary hurdles is the difficulty in timing, location selection, and scheduling. Coordinating an event that aligns with the busy schedules of both clients and legal professionals can be exceptionally complex. Finding a suitable location that is convenient for all attendees, while also ensuring it fits within the firm's budget, adds another layer of complexity. The uncertainty of attendee availability often leads to last-minute changes and cancellations, further complicating the planning process. Additionally, the global nature of many law firms' clientele necessitates consideration of travel logistics, making it even more challenging to select a date and venue that works for everyone.

High logistical demands also pose a significant challenge in organizing successful in-person events. Ensuring a seamless experience involves coordinating multiple elements such as securing the venue, arranging catering, and setting up audio-visual (AV) equipment. Each of these components requires careful planning and execution to meet the high standards expected by attendees. Venue selection alone involves assessing factors such as capacity, accessibility, and amenities, while catering must accommodate diverse dietary preferences and restrictions. AV equipment setup is crucial for presentations and speeches, demanding technical expertise to avoid any disruptions. These logistical demands can strain the resources of law firms, necessitating meticulous attention to detail and often requiring the involvement of specialized event planning professionals to manage effectively.



Timing, location, venue, and scheduling coordination are difficult. Nexl's Event Management, integrated with CRM, helps manage these challenges effectively.

Majela Fonseca | Hutchison PLLC



Pro Tips: How to Leverage Event Checklists and Templates



Download [The Ultimate Guide for Law Firms Mini-Workbook](#) for ready-to-use event checklists and templates for pre- and post-event success.

Pro Tips: How to Execute Events Collaboratively Using CRM-Integrated Event Management



Read Nexl's blog on [How CRM-Powered Event Management Encourages Collaboration](#) through using tools like CRM, Event Workspaces, QR Codes, RSVP Forms, and more.



Listen to Nexl's on-demand webinar on how [The Power of Collaboration Drives Client Retention and Success in Law Firms.](#)



Orchestrating a game-changing event is not a solo-act.

Phillip Thurner | Nexl



Challenges with Virtual Events

Virtual events present their own set of challenges:

- Technology adoption and ensuring platform engagement
- Keeping audiences engaged through interactive elements like polls and breakout rooms

Virtual events, while offering flexibility and broader reach, introduce a unique set of challenges for law firms. One of the foremost difficulties is technology adoption and ensuring platform engagement. Selecting the right technology platform that aligns with the firm's needs and client expectations is crucial. Many attendees may not be familiar with the latest virtual event platforms, leading to potential technical issues and a steep learning curve. Ensuring that all participants can easily navigate the platform, access materials, and engage with the content requires thorough pre-event training and support. Additionally, technical glitches such as connectivity issues, audio-visual problems, and software malfunctions can disrupt the flow of the event and diminish the overall experience for attendees.

Keeping audiences engaged in a virtual setting is another significant challenge. Unlike in-person events, where the atmosphere and physical presence naturally foster engagement, virtual events can struggle to maintain attention. To combat this, law firms must incorporate interactive elements such as polls, Q&A sessions, and breakout rooms. These features can make the experience more dynamic and participatory, encouraging attendees to stay active and involved. However, integrating these elements seamlessly requires careful planning and execution. Polls need to be relevant and timely to keep participants interested, while breakout rooms must be well-facilitated to ensure productive discussions. Balancing the technical and logistical aspects of these interactive features while keeping the content engaging is essential for the success of virtual events.



Tech and platform adoption for virtual events is challenging. Getting participants to interact is a struggle, but interactive tools help.

Keesha Murray | Gilbert + Tobin



Pro Tips: Use Virtual-First Tools to Enhance Webinars, Online Interactions, and More

CATEGORY	TOOLS & LINKS	FEATURES	CATEGORY	TOOLS & LINKS	FEATURES
Webinars	Zoom	Screen sharing, breakout rooms, polls, and Q&A	Interactive Digital Spaces	Gather	Virtual spaces with customizable avatars and interactive objects
	Webex	Interactive whiteboards, real-time polling, and breakout sessions		Spatial	3D virtual rooms, collaboration tools, and VR integration
	GoToWebinar	Custom branding, polls, surveys, and reporting analytics		Kumospace	Virtual office and event spaces with interactive elements
	Goldcast	Analytics, engagement tools, custom branding, and integrations	Engagement Tools	Slido	Live polls, Q&A sessions, and audience insights
Virtual Events	Hopin	Virtual lobbies, networking sessions, and customizable event stages	Mentimeter	Interactive presentations with real-time feedback, polls, and quizzes	
	Brella	AI-powered matchmaking, virtual booths, and live Q&A	Poll Everywhere	Live audience polling, surveys, and real-time response tracking	
	vFairs	Virtual exhibitor booths, webinars, and interactive 3D spaces	Networking and Collaboration	Remo	Virtual tables for networking, real-time chats, and collaboration tools
			Airmeet	Speed networking, virtual tables, and interactive sessions	

Challenges with ROI and Reporting

According to clients surveyed, “measuring ROI and capturing business opportunities” is the biggest challenge when it comes to planning events. Clear metrics for ROI are essential for justifying the investment in events.

Measuring the return on investment (ROI) and capturing business opportunities from events remain significant challenges for law firms today. Clients surveyed consistently highlight this as a primary concern, underscoring the importance of establishing clear and quantifiable metrics. Without definitive ROI metrics, it becomes difficult to justify the considerable investment in event planning and execution. Law firms often struggle to directly attribute new business or client retention to specific events, making it challenging to demonstrate the tangible benefits of these initiatives to stakeholders. This lack of clear ROI metrics can result in hesitancy to invest in future events, potentially limiting a firm’s ability to leverage these opportunities for growth and relationship building.

Moreover, capturing business opportunities during and after events is another area fraught with difficulties. While events are designed to generate leads and foster client relationships, tracking these interactions and converting them into measurable business outcomes can be elusive.

Firms need robust systems to capture data on attendee interactions, follow-up activities, and eventual client engagements. This requires a seamless integration of CRM systems and event management tools to ensure that no opportunity is missed. Additionally, effective post-event analysis is crucial, involving detailed reviews of attendee feedback, engagement levels, and subsequent business transactions. By implementing comprehensive tracking and analysis mechanisms, law firms can better understand the impact of their events, refine their strategies, and ultimately enhance their ability to measure and demonstrate ROI.



Measuring ROI is critical. Tracking interactions and follow-ups through Nexl helps demonstrate long-term value.

Jenny Williamson | FB Rice

FB RICE



Pro Tips: How to Execute Pre- & Post-Event Needs

TIP	ACTION
Assign Specific Follow-Up Tasks	Assign follow-up tasks to partners with clear goals and CTAs. Avoid generic emails; instead, set specific actions like organizing a call, lunch, or meeting. After the event, designate specific partners to follow up with key attendees and provide them with tailored talking points.
Personalize the Follow-Up	Personalize follow-up communications based on the attendee's interests and interactions during the event. Use CRM data to reference specific topics discussed or sessions attended, making the follow-up more relevant and engaging.
Track Follow-Up Opportunities	Ensure all follow-ups are tracked within your CRM system to monitor progress and link any opportunities back to the event. Log each follow-up interaction in your CRM, noting the outcome and any next steps required. This helps in measuring the effectiveness of the event.
Analyze Event Expenses vs. Opportunities	Use tools like ChromeRiver to track event expenses and compare them to the opportunities generated from the follow-ups to determine ROE. After the event, compile all expenses and align them with the revenue opportunities logged in your CRM to calculate the dollar value of the event's return.
Regular Review and Adjustment	Regularly review the effectiveness of follow-up strategies and adjust as needed to improve future event ROI. Hold post-event debriefs with your team to discuss what worked and what didn't, refining your follow-up processes accordingly.



Use this [Comprehensive Events Analytics Guide to ROE](#) to track and increase post-event follow-ups and ensure ROI.



Future State: Law Firms' Vision for Future Events

Solutions to Today's Challenges

Event management in law firms currently faces numerous challenges. The manual process of creating and segmenting invite lists, coordinating timing, location, and scheduling, and managing extensive logistical tasks can be incredibly time-consuming. During events, the burden continues with the need to create, send, and monitor RSVP forms and reminders, as well as track attendance and manage day-of changes, often resulting in fragmented data.

Measuring ROI and maintaining engagement post-event also present significant hurdles, including defining clear ROI metrics and ensuring streamlined follow-up strategies. crucial, involving detailed reviews of attendee feedback, engagement levels, and subsequent business transactions. By implementing comprehensive tracking and analysis mechanisms, law firms can better understand the impact of their events, refine their strategies, and ultimately enhance their ability to measure and demonstrate ROI.

Pre-Planning Logistics

CURRENT STATE	FUTURE STATE
Creating and segmenting invite lists and personalizing invites is manual and time-consuming.	Integrating CRM with event management tools or leveraging all-in-one, legal-specific platforms like Nexl, allow for segmenting audience lists tailored to each event. Create specific invite lists with personalized invite workflows to scale outreach with relationship insights, AI-enhanced email copy, and branded templates.
Timing, location, venue, and scheduling coordination are difficult.	Streamline the entire planning process, offering seamless coordination of timing, location, venue selection, and scheduling through a centralized platform. Connect CRM with Event Management to sync historical interactions to optimize RSVPs and event attendance.
Juggling a never-ending checklist of operational and logistical tasks is taxing.	Utilize project management tools with pre-built event checklists and templates to ensure no operational step gets missed. Use or build a comprehensive platform like Nexl's that integrates CRM, project management, and event management to centralize logistics, reducing the burden of managing venues, catering, and AV equipment disparately.

Event Execution & Tracking

CURRENT STATE	FUTURE STATE
Creating, sending, and monitoring RSVP forms, confirmations, and event reminders is manual and time-consuming.	Create and tailor RSVP forms using branded templates, automatically sync RSVP responses to your CRM, and automate personalized reminder emails to clients using integrated marketing technology.
Tracking and maintaining event attendance and day-of changes during the execution phase is done disparately which leads to fragmented data capture and inconsistencies.	Generate on-site QR code check-ins to secure paperless and instant data capture while greeting each event attendee with a personalized welcome. With Nexl, firms automatically sync event data with CRM data to ensure meaningful follow-ups and accurate ROI-tracking can be done.

Measuring ROI & Maintaining Engagement

CURRENT STATE	FUTURE STATE
Measuring ROI and capturing business opportunities is challenging.	Nexl offers robust tracking and reporting capabilities, allowing firms to measure ROI effectively by logging interactions, follow-ups, and overall engagement, thus uncovering both short-term and long-term business opportunities.
Clear metrics for ROI are essential, yet difficult to define, for justifying event investments.	Nexl provides detailed analytics and reporting tools to track key metrics, ensuring firms can justify their event investments with clear, quantifiable data.
Ensuring post-engagement strategies are streamlined and actioned is crucial for proving Return on Events (ROE).	Nexl's comprehensive follow-up support ensures streamlined post-event engagement, offering features like automated follow-up reminders, personalized follow-up drafts, and ongoing content sharing to maintain client engagement.
Disparate systems for event planning, tracking, and follow-ups make maintaining relationships and measuring ROI difficult.	Nexl's platform integrates CRM, relationship intelligence, event management, and project management, providing a unified system that enhances collaboration and operational efficiency to enable robust and accurate ROI-tracking.

Nexl provides comprehensive solutions to these problems by integrating CRM with event management tools, offering project management support, and facilitating seamless data capture and synchronization. This integration allows for the efficient coordination of event details, from timing and location to logistics and attendee tracking. Nexl's platform enhances collaboration and operational efficiency, enabling accurate ROI tracking, personalized follow-ups, and ongoing client engagement, ultimately streamlining the entire event management process and addressing the key pain points law firms face today.

Evolving Trends in Event Management

Hybrid Events with Tech Integrations

Hybrid events, which combine in-person and virtual elements, are expected to become more prevalent. These events offer broader reach and flexibility while ensuring safety through health and safety measures. The future will see increased use of event apps, virtual reality, and AI to create more engaging experiences. Comprehensive tech stacks that integrate CRM, event management, and project management tools will become standard.

Blending in-person and virtual event components has become a staple in law firm marketing strategies. These events offer the best of both worlds, enabling broader reach and flexibility while ensuring safety through stringent health and safety measures. Attendees can choose to participate in person or virtually, depending on their preferences and circumstances, thus maximizing attendance and engagement. This dual approach not only caters to a wider audience but also ensures continuity in client engagement, even amid potential travel restrictions or health concerns. Law firms can leverage hybrid events to maintain strong client relationships and expand their reach without compromising on safety.

The future of hybrid events will be characterized by the increased use of advanced technologies to create more immersive and engaging experiences. Event apps will play a crucial role in enhancing attendee interaction, providing real-time updates, personalized agendas, and networking opportunities. Virtual reality (VR) and augmented reality (AR) will transform how attendees experience content, offering virtual tours, immersive presentations, and interactive exhibits. Artificial intelligence (AI) will further enhance these experiences by providing personalized content recommendations and facilitating intelligent matchmaking for networking. Comprehensive tech stacks that integrate CRM, event management, and project management tools will become the norm, enabling seamless planning, execution, and follow-up of hybrid events. These integrated systems will streamline operations, improve data capture and analysis, and ultimately drive better ROI by aligning event activities with broader business development goals.

Content Planning and Strategic Event Formats

Effective content planning and development are crucial for successful events. This involves comprehensive research and clear goal setting, designing engaging formats, and inviting expert speakers tailored to the audience's interests and needs. Utilizing CRM data is essential for personalizing content and invitations, ensuring that each event resonates with its specific audience.

Looking ahead, successful event formats will likely continue to feature speaking engagements and thought leadership opportunities. Additionally, there will be a growth in tailored, intimate events designed for specific client segments, offering more personalized and impactful experiences.

By integrating these strategies, law firms can enhance the effectiveness of their events, driving greater engagement and achieving better outcomes.



Logistical and strategic control ensures the right people and presentations are paired with the right audience. Ownership of data and clear brand visibility through solo hosting are key advantages.

Tanya Riggan | Koley Jessen

KOLEY ■ JESSEN

Maintaining Engagement and Measuring Success

Maintaining engagement and accurately measuring the success of events are critical for their long-term impact and business development. Future strategies will focus on enhancing methods for tracking and reporting event ROI and developing innovative post-event strategies to ensure sustained engagement. Effective post-event engagement strategies include streamlined follow-ups facilitated by CRM systems, ongoing value-additive content sharing, and continuous interaction to keep the firm top-of-mind for participants.

Events will continue to play a vital role in client engagement, brand awareness, and business development. Their strategic alignment with overall marketing goals and the value they provide will be crucial. Integrating CRM systems ensures that data from events is seamlessly incorporated into broader marketing and business development efforts, enhancing the effectiveness of these initiatives.

Looking ahead, we anticipate more frequent and diverse event formats, with a continued emphasis on personalized, high-impact events tailored to meet specific client needs. By leveraging these strategies and tools like Nexl, law firms can drive greater engagement, achieve better outcomes, and ensure the long-term success of their event management efforts.



Post-engagement strategies are crucial for proving ROE (Return on Events). Timely follow-ups and ongoing content sharing are essential.

John Eix | Crowe & Dunlevy



Conclusion

Enhancing ROI with CRM-Integrated Event Management

The evolution of event management in law firms has been marked by significant changes, particularly in response to the COVID-19 pandemic. Historically, in-person events were the norm, serving as a cornerstone for networking, showcasing expertise, and building relationships. However, the pandemic forced a rapid shift to virtual events, which brought about new challenges and opportunities.

Today, law firms face several challenges in event management, including the manual process of creating and segmenting invite lists, coordinating logistics, and managing extensive operational tasks. Additionally, tracking attendance, managing day-of changes, and measuring ROI present significant hurdles. Despite these challenges, in-person events have made a comeback, but firms now must offer highly tailored and value-driven experiences to ensure attendance and engagement.

Nexl provides comprehensive solutions to these challenges through its integrated CRM and event management tools. By centralizing logistics, enhancing collaboration, and facilitating seamless data capture and synchronization, Nexl streamlines the entire event management process. This integration enables efficient coordination of event details, accurate ROI tracking, personalized follow-ups, and ongoing client engagement, addressing the key pain points law firms face today.

Looking ahead, the future of event management in law firms will be characterized by the rise of hybrid events, combining in-person and virtual elements for broader reach and flexibility. Effective content planning, personalized event formats, and strategic alignment with marketing goals will be crucial. Nexl's robust platform will play a pivotal role in this evolution, offering the tools necessary to enhance engagement, measure success accurately, and drive long-term business growth.

By leveraging these strategies and tools like [Nexl](#), law firms can navigate the complexities of event management, ensuring that their events remain impactful and aligned with their overall business development objectives.

We extend our thanks to the following Nexl clients who contributed their invaluable insights:





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Nexl is a leading provider of innovative legal technology solutions aimed at creating efficiencies, accelerating growth and providing data-driven insights that drive smart decision making. We offer scalable solutions for law firms of all shapes and sizes. Founded by legal professionals with vast experience working within legal firms, Nexl grew out of a desire to fundamentally change the way that legal firms grow and engage with internal and external stakeholders. The existing way of managing these relationships doesn't work. Today, we're driving the delivery of smart, innovative and technology-driven services to clients worldwide. Smart, insight-driven solutions underpin Nexl's purpose. Drawing from our own practical experience working within the professional services industry, our purpose is to develop and deliver technology solutions that will drive positive change in how law firms manage their client relationships and grow their practice.

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